

Atty Judd, Darin T. (Attorney for Daniel J. McCann)

Atty Sartore, John T. (Petitioner)

## Application for Admission of John T. Sartore to the Bar of this Court Pro Hac Vice

			<b>JOHN T. SARTORE</b> is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	<b>Aff.Sub.Wit.</b>		Petitioner states he is a Director of the law firm of Paul Frank + Collins and applies for admission to practice before this Court <i>pro hac vice</i> in order to represent Daniel J. McCann in this action.	
✓	<b>Verified</b>			
	<b>Inventory</b>			
	<b>PTC</b>		See petition re details. Petitioner states he was admitted to practice before the Supreme Court of the State of Vermont in 1972, the Supreme Court of the State of New York in 1989, the U.S. District Court for the District of Vermont in 1972, the U.S. District Court for the Northern District of New York in 1989, the U.S. District Court for the Southern District of New York in 2007, the Supreme Court of the United States in 1999, the U.S. District Court for the Northern District of Illinois in 2010, and the U.S. District Court for the Western District of New York in 2013. He is currently a member in good standing in such courts. He has not been suspended or disbarred in any courts. In the preceding two years, he has not applied to appear <i>pro hac vice</i> in any other California actions.	
	<b>Not.Cred.</b>			
✓	<b>Notice of Hrg</b>			
✓	<b>Aff.Mail</b>	w		
	<b>Aff.Pub.</b>			
	<b>Sp.Ntc.</b>			
	<b>Pers.Serv.</b>			
	<b>Conf. Screen</b>			
	<b>Letters</b>			
	<b>Duties/Supp</b>			
	<b>Objections</b>			
	<b>Video Receipt</b>			
	<b>CI Report</b>			
	<b>9202</b>			
✓	<b>Order</b>			
	<b>Aff. Posting</b>			
	<b>Status Rpt</b>			
	<b>UCCJEA</b>			
	<b>Citation</b>			
	<b>FTB Notice</b>			
				<b>Reviewed by:</b> skc
				<b>Reviewed on:</b> 9-8-14
				<b>Updates:</b>
				<b>Recommendation:</b>
				<b>File 1 - McCann</b>

Atty Perez, Juan (pro per father)

Atty Aguilar, Nellie R (for Petitioner Matilde Lopez)

## Status Hearing

Samantha, 7	<b>TEMPORARY EXPIRED 8/7/14</b>		<b>NEEDS/PROBLEMS/COMMENTS:</b>
Kevin, 3	<b>MATILDE LOPEZ</b> , half-sister, is Petitioner.		
	Father: <b>JUAN PEREZ</b>		<p><b>Continued from 8/7/14. Minute Order states the Court requires the appearance of Attorney Nellie Aguilar. Temporary not extended.</b></p> <p>1. Need current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
	Mother: <b>ROSA MARIA HERNANDEZ CISNEROS</b> - Deceased		
Cont. from 080714	Petitioner, <b>Matilde Lopez</b> , filed a petition to be appointed guardian of her siblings. In her petition she alleged physical and mental abuse by the father. In addition, there were additional statements alleging possible sexual abuse.		
Aff.Sub.Wit.	<b>Court Investigator Dina Calvillo'S Report filed 1/30/14.</b>		
Verified	<b>Minute order dated 2/6/14</b> set this matter for a contested hearing. Visitation was to be determined between the parties with the exception that the father have a minimum of one visit per week with the children.		
Inventory	Minute order dated 6/26/14 (Court Trial) set this matter for status hearing.		
PTC	Samantha's Counseling Progress Report filed 8/5/14.		
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
			<b>Reviewed by: KT</b>
			<b>Reviewed on: 9/9/14</b>
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 2 – Perez &amp; Hernandez</b>

(1) Waiver of Accounting and Petition for Allowance of Commissions and Fees  
and (2) For Final Distribution

<b>DOD: 06/22/11</b>		<b>KAREN FLAGLER</b> , Administrator, is Petitioner.  Accounting is waived.  I & A - \$222,602.61 POH - \$367,515.12  Administrator - \$7,452.05 (statutory)  Attorney - \$7,452.05 (statutory)  Costs - \$1,357.66 (filing fees, publication, probate referee)  Petitioner states that all estate assets are the community property of decedent and his surviving spouse, Patricia Bandoni.  <b>Distribution, pursuant to intestate succession, is to:</b>  Patricia Bandoni - \$367,515.12 (consisting of cash, stocks and mutual funds)	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Cont. from</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input checked="" type="checkbox"/>	<b>Inventory</b>		
<input checked="" type="checkbox"/>	<b>PTC</b>		
<input checked="" type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b> w/		
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b> 08/08/13		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input checked="" type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input checked="" type="checkbox"/>	<b>FTB Notice</b>		
		<b>Reviewed by:</b> JF <b>Reviewed on:</b> 09/08/14 <b>Updates:</b> <b>Recommendation:</b> SUBMITTED <b>File 3 - Bandoni</b>	



**5 George Joaquin Galvan (Estate)**

Case No. 13CEPR01046

Atty Cowin, Michael D. (Pro Per Petitioner)

Atty Cowin, Daniel Ray (Pro Per Petitioner)

**First Amended Petition for Probate of Will and for Letters Testamentary**

<b>DOD: 8-16-13</b>	<b>MICHAEL D. COWIN and DANIEL RAY COWIN</b> , named Co-Executors without bond, are Petitioners.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u>Note: Petitioners filed a Petition for Termination of Proceedings on 6-27-14 that was set for 8-4-14. However, there were no appearances on 8-4-14 and the Court continued the matter to 9-22-14 and also set an Order to Show Cause for explanation.</u>  <u>Note: The progression of this estate matter is highly unusual.</u>  <u>Please see notes on Page 2.</u>
<b>Cont. from 031314, 050114, 062614</b>		
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	
<input checked="" type="checkbox"/>	<b>Verified</b>	
<input type="checkbox"/>	<b>Inventory</b>	
<input type="checkbox"/>	<b>PTC</b>	
<input type="checkbox"/>	<b>Not.Cred.</b>	
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>	
<input checked="" type="checkbox"/>	<b>Aff.Mail</b> W	
<input type="checkbox"/>	<b>Aff.Pub.</b> X	
<input type="checkbox"/>	<b>Sp.Ntc.</b>	
<input type="checkbox"/>	<b>Pers.Serv.</b>	
<input type="checkbox"/>	<b>Conf. Screen</b>	
<input checked="" type="checkbox"/>	<b>Letters</b>	
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>	
<input type="checkbox"/>	<b>Objections</b>	
<input type="checkbox"/>	<b>Video Receipt</b>	
<input type="checkbox"/>	<b>CI Report</b>	
<input type="checkbox"/>	<b>9202</b>	
<input checked="" type="checkbox"/>	<b>Order</b>	
<input type="checkbox"/>	<b>Aff. Posting</b>	
<input type="checkbox"/>	<b>Status Rpt</b>	
<input type="checkbox"/>	<b>UCCJEA</b>	
<input type="checkbox"/>	<b>Citation</b>	
<input type="checkbox"/>	<b>FTB Notice</b>	
Full IAEA – ok		
Will dated: 3-19-04		
Residence: Clovis		
Publication – Business Journal		
<b>Estimated Value of the Estate:</b> Personal property: \$220,000.00		
<b>Probate Referee:</b> <b>Steven Diebert</b>		
<b>Reviewed by:</b> skc		
<b>Reviewed on:</b> 9-8-14		
<b>Updates:</b>		
<b>Recommendation:</b>		
<b>File 5 – Galvan</b>		

## Page 2

**Examiner's Note re History of this matter:** According to the decedent's will, the heirs to this estate are the decedent's four (4) stepsons, Alvin Leon Cowin, Kenneth Paul Cowin, Michael Dale Cowin, and Daniel Ray Cowin. The will names Michael Dale Cowin, and Daniel Ray Cowin as co-executors.

Michael Cowin previously filed a Petition for Probate of Will requesting to be appointed as Executor alone. However, at the hearing on 1-23-14, Daniel Cowin, the other named co-executor, appeared, and the parties were directed to participate in mediation.

An agreement dated 1-23-14 between Michael Cowin and Daniel Cowin addresses working together to identify assets and includes a list of accounts. The agreement states they are working on a plan for distribution.

On 1-27-14, Michael Cowin's original petition was denied without prejudice and the Court directed that an amended petition be filed and no republication be required.

This Amended Petition for Probate of Will and for Letters Testamentary was filed on 2-11-14 by Michael Cowin, and Daniel Cowin together, and has been continued since then.

A second mediation agreement was filed on 3-10-14 wherein the petitioners appear to agree to various distributions.

Examiner previously that distributions were not appropriate at this time, as the probate estate has not yet been opened.

However, per minute order 3-13-14, the Court was advised that an agreement was reached during mediation, and Petitioners were directed to file a petition to close an estate with no assets.

A Petition to Terminate Proceedings was filed on 6-17-14 and set for hearing 8-4-14; however, there were no appearances and the Court set an Order to Show Cause for 9-22-14 to explain the request.

**Examiner's Note Re Petition to Terminate Proceedings:** Examiner noted for the hearing on 8-4-14 that the Court may require clarification regarding how there was originally estimated to be \$220,000.00 in personal property assets, and the mediation agreements included reference to various accounts and also agreements for distributions, but now according to this petition, this is a "no-asset" estate?

How was it determined that the assets that were originally alleged and later identified in the agreements, were not subject to probate? There is no explanation of how it was determined that the assets were not subject to administration, and no explanation as to the discrepancy in the amounts.

Probate estates are protective proceedings designed to ensure that all interested persons have been given notice, etc. This includes heirs and potential creditors of the decedent, as well as various governmental agencies, such as the Franchise Tax Board and the Dept. of Health Care Services. As such, there are various types of proceedings, and various steps required for each type.

In a probate estate, Court authorization is necessary before any distribution of assets. The mediation services that are available to litigants are not a substitute for the procedures required by law.

Because Petitioners are not represented by legal counsel, Examiner brings up these details for the Court's consideration, even though the will was never admitted to probate and Letters never issued.

**Petition for Determination of Validity of Trust Amendment; in the Alternative for  
order Confirming Exercise of Power of Appointment**

		<b>SUSAN FORD FRANTZICH</b> , Beneficiary, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u>A demurrer was filed and set for  hearing on 8-7-14, and continued to  9-8-14 (Page B).</u>  <u>Therefore, Examiner Notes are not  provided at this time.</u>
Cont. from 071514, 080714			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		Reviewed by: skc	
		Reviewed on: 9-8-14	
		Updates:	
		Recommendation:	
		File 6A - Ford	

**Notice of Demurrer and Demurrer to Petition for Determination of Validity of Trust  
Amendment, in the Order Confirming Exercise of Power of Appointment**

		<b>NEEDS/PROBLEMS/COMMENTS:</b>  Examiner Notes are not provided for this type of filing.
<b>Cont. from 080714</b>		
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	
<input type="checkbox"/>	<b>Verified</b>	
<input type="checkbox"/>	<b>Inventory</b>	
<input type="checkbox"/>	<b>PTC</b>	
<input type="checkbox"/>	<b>Not.Cred.</b>	
<input type="checkbox"/>	<b>Notice of Hrg</b>	
<input type="checkbox"/>	<b>Aff.Mail</b>	
<input type="checkbox"/>	<b>Aff.Pub.</b>	
<input type="checkbox"/>	<b>Sp.Ntc.</b>	
<input type="checkbox"/>	<b>Pers.Serv.</b>	
<input type="checkbox"/>	<b>Conf. Screen</b>	
<input type="checkbox"/>	<b>Letters</b>	
<input type="checkbox"/>	<b>Duties/Supp</b>	
<input type="checkbox"/>	<b>Objections</b>	
<input type="checkbox"/>	<b>Video Receipt</b>	
<input type="checkbox"/>	<b>CI Report</b>	
<input type="checkbox"/>	<b>9202</b>	
<input type="checkbox"/>	<b>Order</b>	
<input type="checkbox"/>	<b>Aff. Posting</b>	
<input type="checkbox"/>	<b>Status Rpt</b>	
<input type="checkbox"/>	<b>UCCJEA</b>	
<input type="checkbox"/>	<b>Citation</b>	
<input type="checkbox"/>	<b>FTB Notice</b>	
		<b>Reviewed by:</b> skc
		<b>Reviewed on:</b> 9-8-14
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 6B – Ford</b>



Petition for Appointment of Probate Conservator of the Person and Estate (Prob. C. 1820, 1821, 2680-2682)

Age: 74		<b>TEMPORARY EXPIRES 08/28/14</b>		<b>NEEDS/PROBLEMS/COMMENTS:</b>	
		<b>PUBLIC GUARDIAN</b> , is Petitioner and requests appointment as Conservator of the Person and Estate without bond.		<b>CONTINUED FROM 08/28/14</b>	
				<b>Court Investigator advised rights on 08/18/14.</b>	
				<b>Note:</b> Declaration of Hoyle Leigh, M.D. states that Mr. Toscano lacks capacity to give informed medical consent and supports dementia powers, however Petitioner did not request medical consent or dementia powers.	
Cont. from 082814		<b>Estimated Value of the Estate:</b> Annual income - \$17,436.00		<b>Note: If the petition is granted status hearings will be set as follows:</b>	
	Aff.Sub.Wit.			• Thursday, January 8, 2015 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u>	
✓	Verified			• Thursday, October 29, 2015 at 9:00a.m. in Dept. 303 for the filing of the first account	
	Inventory			Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter, the status hearing will come off calendar and no appearance will be required.	
	PTC			<b>Note:</b> The Order/Letters do not include medical consent or dementia powers.	
	Not.Cred.			<b>Reviewed by:</b> JF	
✓	Notice of Hrg			<b>Reviewed on:</b> 09/08/14	
✓	Aff.Mail	w/		<b>Updates:</b>	
	Aff.Pub.			<b>Recommendation:</b>	
	Sp.Ntc.			<b>File 7 - Toscano</b>	
✓	Pers.Serv.	w/			
	Conf. Screen	n/a			
✓	Letters				
	Duties/Supp	n/a			
	Objections				
	Video Receipt	n/a			
✓	CI Report				
	9202				
✓	Order				
	Aff. Posting				
	Status Rpt				
	UCCJEA				
✓	Citation				
	FTB Notice				

<b>DOD: 7-24-14</b>		<b>BEN KOHRMAN</b> , named executor without bond, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>1. The court may require bond if the proposed personal representative resides outside California or for other good cause, even if the will waives bond, pursuant to California Rules of Court 7.201(b) and Probate Code 8571.</b>  <b>Therefore, the Court may require bond of \$318,000.00.</b>  <u><b>Note:</b></u> The Court will set status hearings as follows:  <ul style="list-style-type: none"> <li>• Thurs 10-30-14 for filing of bond, if required</li> <li>• Thurs 1-15-15 for filing the Inventory and Appraisal</li> <li>• Thurs 1-14-16 for filing the first account or petition for final distribution.</li> </ul> <b>If the proper items are on file per local rules, the status hearings may be taken off calendar.</b>
		Petitioner is a resident of Lansing, Michigan.	
		Full IAEA – ok	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input type="checkbox"/>	<b>Inventory</b>	Will dated 11-7-00	
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>	Residence: Fresno	
<input type="checkbox"/>		Publication: Business Journal	
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>	Estimated value of estate:	
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	Personal property: \$140,000.00	
<input checked="" type="checkbox"/>	<b>Aff.Pub.</b>	Annual income: \$ 3,000.00	
<input type="checkbox"/>	<b>Sp.Ntc.</b>	Real property: \$175,000.00	
<input type="checkbox"/>	<b>Pers.Serv.</b>	Total: \$318,000.00	
<input type="checkbox"/>	<b>Conf. Screen</b>	Probate Referee: Rick Smith	
<input checked="" type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
<b>Reviewed by:</b> skc			
<b>Reviewed on:</b> 9-8-14			
<b>Updates:</b>			
<b>Recommendation:</b>			
<b>File 8 - Riba</b>			

<b>DOD: 03/14/12</b>	<b>SCOTT MATTESON</b> , son, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	40 days since DOD.	
<b>Cont. from</b>	No other proceedings.	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/> <b>Verified</b>	I & A - \$129,000.00	
<input checked="" type="checkbox"/> <b>Inventory</b>	Decedent died intestate.	
<input type="checkbox"/> <b>PTC</b>		
<input type="checkbox"/> <b>Not.Cred.</b>		
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	Petitioner requests court determination that decedent's 100% interest in real property located at 230 Sunnyside Ave., Clovis pass to him pursuant to intestate succession.	
<input checked="" type="checkbox"/> <b>Aff.Mail</b>	w/	
<input type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b>		
<input type="checkbox"/> <b>Conf. Screen</b>		
<input type="checkbox"/> <b>Letters</b>		
<input type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed by:</b> JF
		<b>Reviewed on:</b> 09/08/14
		<b>Updates:</b>
		<b>Recommendation:</b> SUBMITTED
		<b>File 9 - Matteson</b>

**Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)**

<b>Age:</b>		<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>DOD:</b>		
<b>Cont. from</b>		
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>		
<input type="checkbox"/> <b>Verified</b>		
<input type="checkbox"/> <b>Inventory</b>		
<input type="checkbox"/> <b>PTC</b>		
<input type="checkbox"/> <b>Not.Cred.</b>		
<input type="checkbox"/> <b>Notice of Hrg</b>		
<input type="checkbox"/> <b>Aff.Mail</b>		
<input type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b>		
<input type="checkbox"/> <b>Conf. Screen</b>		
<input type="checkbox"/> <b>Letters</b>		
<input type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		
		<b>CONTINUED TO 10/14/14</b> <b>Per request of counsel</b>
		<b>Reviewed by:</b> JF
		<b>Reviewed on:</b> 09/08/14
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 10 - Berlese</b>

<b>DOD: 10/22/10</b>	<b>LEANNE WALKER GRANT</b> , niece, was appointed Administrator with bond fixed at \$7,000,000.00 on 03/12/12. Letters of Administration were issued on 05/16/12.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
Cont. from 110513, 020314, 050514, 072414	<b>First Report of Personal Representative and Petition for its Settlement; Petition to Determine Entitlement to Estate Distribution and to Allow Administration of Estate to Continue</b> filed 06/13/13 and approved on 07/15/13.	<p align="center"><b><u>OFF CALENDAR</u></b></p> <p align="center"><b>First Account and Report of Personal Representative, etc. Filed 09/09/14 and set for hearing on 10/20/14</b></p>
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg	<b>Minute Order from 07/15/13</b> set this matter status regarding preliminary distribution on 11/05/13.	
Aff.Mail		
Aff.Pub.	<b>Inventory &amp; Appraisal, partial No. 1</b> filed 09/20/13 - \$202,328.21	
Sp.Ntc.		
Pers.Serv.	<b>Inventory &amp; Appraisal, partial No. 2/Final</b> filed 09/20/13 - \$6,763,876.49	
Conf. Screen		
Letters	<b>Status Report of Personal Representative filed 07/21/14</b> states:	
Duties/Supp	Counsel for the personal representative has prepared a petition for, among other things, settlement of the first account and petition for approval of a significant preliminary distribution of a portion of decedent's estate. Due to travel schedules, the personal representative and her counsel are not able to meet to discuss the proposed petition before the 07/24/14 hearing, but are scheduled to meet on 08/05/14. It is anticipated that a petition will be filed shortly after the 08/05/14 meeting and a continuance to 08/08/14 is requested.	
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		<b>Reviewed by:</b> JF
		<b>Reviewed on:</b> 09/08/14
		<b>Updates:</b> 09/09/14
		<b>Recommendation:</b>
		<b>File 11 – Lowery</b>

**(Terminate the Conservatorship based on the vacancy of the Conservator)**

<b>Age: 58</b>	<p><b>CLYDE M. HUTCHENS</b>, father, now deceased, was appointed Conservator on 05/12/1976. Letters issued on 05/17/1976.</p> <p>Notice of Status Hearing filed 07/13/2014 set this matter for hearing.</p> <p><b>Court Investigator Samantha Henson's</b> report filed 07/25/2014.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p>
<b>Cont. from</b>		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by: LV</b>
		<b>Reviewed on: 09/09/2014</b>
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 12 - Hutchens</b>

Pro Per DeGeorge, Lois (Pro Per Petitioner, Executor)  
 Atty Markeson, Thomas A., of Wild Carter & Tipton (for Valley Stairway, Inc.; Jerry DeGeorge; and Anthony DeGeorge, Jr.)

## (1) First and Final Petition and Report of Executor (2) for Final Distribution

<b>DOD: 9/3/2005</b>		<b>LOIS MARIE DeGEORGE</b> , spouse and Executor appointed on <u>7/25/2006</u> with Full IAEA authority without bond, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b><u>Continued from 7/24/2014.</u></b> Minute Order states examiner notes are provided to the petitioner. The petitioner is directed to provide notice to Joseph DeGeorge and all other parties legally entitled to notice.  <b><u>Note:</u></b> Minute Order dated <b><u>6/12/2014</u></b> from the previous continuance of this matter states Ms. DeGeorge is directed to provide the required notice to the parties as well as counsel.  <b><u>Note:</u></b> Court records do not show a <i>Final Inventory and Appraisal</i> has been filed in this estate pursuant to Probate Code § 8800(b), to inform the Court of any assets that may have been marshalled by the Executor.  <b>~Please see additional page~</b>
<b>Cont. from 050814, 061214, 072414</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input type="checkbox"/>	<b>Inventory</b>	X	
<input type="checkbox"/>	<b>PTC</b>	X	
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	W/	
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input checked="" type="checkbox"/>	<b>9202</b>		
<input type="checkbox"/>	<b>Order</b>	X	
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input checked="" type="checkbox"/>	<b>FTB Notice</b>		

**Account period: not stated [7/25/06 – 4/1/14]**  
 Petition does not state the account period pursuant to Probate Code § 1061(a). However, based upon this atypical case characterized by lapse of time with few administrative actions taken and the simplified accounting presented, the account period may be presumed to be from the date of appointment and/or date *Letters* issued, to the date of the execution and verification of this accounting.

Accounting - **\$ not stated**  
 Beginning POH - **\$ not stated**  
 Ending POH - **\$ not stated**

Executor - **waives**

**Petitioner states:**

- An Inventory and Appraisal has not been filed with this Court;
- No actions were taken under Independent Administration of Estates Act (IAEA);
- The heirs under Decedent's Will are **JOSEPH DeGEORGE**, grandson, and **LISA M. FARMEN**, granddaughter;
- On 11/17/2006, the Executor paid **\$100,000.00** to **JOSEPH DeGEORGE** and **\$100,000.00** to **LISA M. FARMEN** from the Trust of the Decedent;
- Executor received no fee for these distributions; Executor is not asking for compensation.

**Petitioner prays for an Order of this Court that:**

- The administration of the Estate be brought to a close; and
- The *First and Final Petition and Report of Executor for Final Distribution* be approved.

**NEEDS/PROBLEMS/COMMENTS, continued:** The following issues from the last hearing remain:

1. ***Petition*** does not identify the TRUSTEE of the ANTHONY DeGEORGE REVOCABLE LIVING TRUST AGREEMENT, the beneficiary of Decedent's Will. Need Notice of Hearing of the *Petition for Final Distribution on Waiver of Accounting*, together with a copy of the petition, and proof of mailed service of 15 days' notice prior to hearing pursuant to Probate Code §§ 1220, 11000 and 11601 for the TRUSTEE of the ANTHONY DeGEORGE REVOCABLE LIVING TRUST AGREEMENT dated 5/13/1997, as Amended by FOURTH AMENDMENT thereto dated 8/24/2011. *(If the Petitioner is the Trustee of said Trust, the Petition should specify such to avoid the Court questioning proper service of notice.)*
2. Need proposed order pursuant to Local Rule 7.1.1(F) providing that a proposed order shall be submitted with all pleadings that request relief.

Notes Re Distribution: *First and Final Petition and Report of Executor for Final Distribution* does not comply with the provisions for estate accountings pursuant to Probate Code §§ 1061 et seq. The following notes are provided for the Court's consideration with respect to approval of the *Petition*:

- Petitioner states in Paragraph 16 of the *Petition* under the heading "Distribution of Estate" that she distributed a total of **\$200,000.00** to two of Decedent's heirs from the "Trust of Decedent." It is unclear whether Petitioner intends to mean by this statement that the estate contains no assets, or to mean that assets were distributed from the Decedent's Estate to the Decedent's Trust, which is a violation of the Probate Code provisions requiring Court order authorizing distribution of estate assets. It appears Petitioner may have marshalled estate assets, based upon the statement that assets were distributed.
- It is unclear from the *Petition* whether Petitioner served or currently serves as Trustee of the Trust of the Decedent, though as Executor of the Estate she is responsible for distributing to the beneficiary in Decedent's Will, namely the **TRUSTEE of the ANTHONY DeGEORGE REVOCABLE LIVING TRUST AGREEMENT dated 5/13/1997**, as Amended by **FOURTH AMENDMENT thereto dated 8/24/2011**, and not directly to the two persons named in the *Petition*, **JOSEPH DeGEORGE**, grandson, and **LISA M. FARMEN**, granddaughter, who may be beneficiaries of the Decedent's Trust, but who are not identified as such in the instant *Petition*.

**Notes for Background Re Case History:**

- Lois DeGeorge (represented by Attorney John Fennacy) filed on 5/9/2006 a *Petition for Probate* seeking appointment as Executor of Decedent's Will dated 7/18/2002. Amended *Petition for Probate* was filed on 5/22/2006. Order for Probate appointing Lois DeGeorge as Executor was filed 7/25/2006, and Letters issued on that date.
- Lois DeGeorge (in pro per) filed on 4/3/2007 a *Petition for Order Compelling Central Valley Community Bank to Produce Documents*. Minute Order dated 5/7/2007 states in pertinent part that Jan Boman personally appeared on behalf of Central Valley Community Bank. Ms. Boman reported that Anthony DeGeorge has no assets at the bank as owner or beneficiary since 2002. *Petition* dismissed without prejudice.
- Lois DeGeorge (represented by Attorney Joanne Sanoian) filed on 2/16/2010 a *Petition to Determine Title to and Require Transfer of Personal Property to Estate of Decedent*. Following litigation including demurrer by attorneys for Jerome (Jerry) DeGeorge and Anthony DeGeorge, Jr., the Court issued on 7/19/2010 an Order *Dismissing Petition to Determine Title to and Require Transfer of Personal Property to Estate of Decedent*.
- Lois DeGeorge (represented by Attorney Joanne Sanoian) filed on 7/23/2010 a *First Amended Petition to Determine Title to and Require Transfer of Personal Property to Estate of Decedent*, culminating in an Order *Dismissing Petition* filed July 23, 2010 [by Lois DeGeorge to determine title to estate property], which was entered on 1/3/2011, thereby serving as the end to the litigation that had been ongoing since 2006.



Pro Per Okamura, Suzanne (Pro Per Petitioner, Administrator)

## Petition for Final Distribution on Waiver of Accounting

<b>DOD: 6/6/2013</b>		<b>SUZANNE OKAMURA</b> , sister and Administrator, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Page 15</b> is the related <i>Estate of Ito Okamura</i> .
		Accounting is waived.	
<b>Cont. from</b>		I & A — <b>\$132,454.00</b>	<ol style="list-style-type: none"> <li><i>Petition</i> is signed but not verified by the Petitioner pursuant to Probate Code § 1021 and CA Rule of Court 7.103.</li> <li>Paragraph 5 of the <i>Petition</i> states a copy of the notice to the Franchise Tax Board is attached as <i>Exhibit A</i>; however, <i>Exhibit A</i> contains a copy of the Internal Revenue Service notice of assignment of employer identification number. Nonetheless, the statement in Paragraph 5 of the <i>Petition</i> indicating that notice was given to the Franchise Tax Board on 10/7/2013 will be sufficient if the Petitioner verifies the <i>Petition</i>.</li> <li><i>Exhibit C, Heirs of Decedent and Proposed Distribution</i> states the Petitioner (Decedent's sister) is the sole heir entitled to <b>100%</b> interest in the estate. However, pursuant to Probate Code § 6402(a)(b), the estate should be distributed to the estate of the Decedent's post-deceased mother, <b>ITO OKAMURA</b>. Need revised <i>Exhibit C</i> and revised proposed order stating the correct distribution to the <b>ESTATE OF ITO OKAMURA</b>. –Revised order submitted 9/10/14; still need revised <i>Exhibit C</i>.</li> </ol>
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	POH — <b>\$132,454.00</b> (\$1,954.00 is cash)	
<input type="checkbox"/>	<b>Verified</b>		
<input checked="" type="checkbox"/>	<b>Inventory</b>		
<input checked="" type="checkbox"/>	<b>PTC</b>	Administrator — <b>waives</b>	
<input checked="" type="checkbox"/>	<b>Not.Cred.</b>		
<input type="checkbox"/>	<b>Notice of Hrg</b>	Closing — <b>\$435.00</b>	
<input type="checkbox"/>	<b>Aff.Mail</b>	<b>Distribution pursuant to intestate succession is to:</b>	
<input type="checkbox"/>	<b>Aff.Pub.</b>	<b>[ESTATE OF ITO OKAMURA] – \$1,954.00 cash</b> , real property, and household furnishings, furniture, and personal belongings, and vehicle.	
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b> 101413		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input checked="" type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>	?	

<b>Reviewed by:</b> LEG
<b>Reviewed on:</b> 9/9/14
<b>Updates:</b> 9/10/14
<b>Recommendation:</b>
<b>File 14 - Okamura</b>

Pro Per Okamura, Suzanne (Pro Per Petitioner, Administrator)

## Petition for Final Distribution on Waiver of Accounting

<b>DOD: 6/23/2013</b>		<b>SUZANNE OKAMURA</b> , sister and Administrator, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		Accounting is waived.	
<b>Cont. from</b>		I & A — <b>\$383,670.01</b>	1. Need <i>Notice of Hearing</i> and proof of service of notice to the following persons pursuant to Probate Code §§1220(a)(1) and 11000 for settlement of the account, or waivers of notice: • <b>JERROD WILLIAM WHITE</b> , grandson; • <b>EILEEN REIKO NITASAKA</b> , named alternate executor. <i>--Notice of Hearing filed 9/10/2014 shows notice was mailed to the above persons on 9/10/2014, which is only 1 day prior to hearing rather than 15 days as required.</i>
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	POH — <b>\$383,670.01</b> (\$1,465.84 is cash)	
<input type="checkbox"/>	<b>Verified</b>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>	Administrator — <b>waives</b>	
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	Closing — <b>\$435.00</b>	
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>	<b>Distribution pursuant to Decedent's Will is to:</b>	
<input type="checkbox"/>	<b>Pers.Serv.</b>		2. <i>Petition</i> is signed but not verified by the Petitioner pursuant to Probate Code § 1021 and CA Rule of Court 7.103.  3. Paragraph 5 of the <i>Petition</i> states a copy of the notice to the Franchise Tax Board is attached as <i>Exhibit A</i> ; however, <i>Exhibit A</i> contains a copy of the Internal Revenue Service notice of assignment of employer identification number. Nonetheless, the statement in Paragraph 5 of the <i>Petition</i> indicating that notice was given to the Franchise Tax Board on 10/7/2013 will be sufficient if the Petitioner verifies the <i>Petition</i> . <i>~Please see additional page~</i>
<input type="checkbox"/>	<b>Conf. Screen</b>	<b>[Beneficiary or Beneficiaries Unclear] – \$1,465.84 cash</b> , life insurance proceeds, and pension funds.	
<input type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		<b>Reviewed by:</b> LEG
<input type="checkbox"/>	<b>UCCJEA</b>		<b>Reviewed on:</b> 9/9/14
<input type="checkbox"/>	<b>Citation</b>		<b>Updates:</b> 9/10/14
<input type="checkbox"/>	<b>FTB Notice</b>	<input type="checkbox"/>	<b>Recommendation:</b>
			<b>File 15 - Okamura</b>

**NEEDS/PROBLEMS/COMMENTS, continued:**

4. The Last Will and Testament of **ITO OKAMURA** makes the following quoted devise: "I devise, bequeath and give my **PROPERTY, ESTATE, BANK ACCOUNTS, BENEFICIARY ENTITLEMENTS, AND INSURANCE SETTLEMENTS** to **SUZANNE OKAMURA**." The label "Beneficiary Entitlements" is ineffective to devise any property, as designation of a beneficiary is only changed by requesting the change through the holder of the property to be distributed to the designated beneficiary, such as a pension fund company. Similarly, the label "Insurance Settlements" is also ineffective to devise any property, as the insurance proceeds pass to the designated beneficiary, and the beneficiary is only changed by request to the insurance company. Petitioner does not make clear whether there exist alternate designated beneficiaries for the following estate assets that have been inventoried:
4. "Life Insurance – Protective insurance, beneficiary to Daniel Okamura;"
  5. "403(b) – Valic, beneficiary to Daniel Okamura."

Daniel Okamura pre-deceased the Decedent, thus his designations as beneficiary of the assets are no longer effective. If alternative beneficiary designations exist for the above assets, the assets would pass to the designated beneficiaries; if no alternative designations exist, it appears the Petitioner **SUZANNE OKAMURA, JERROD WILLIAM WHITE** and **EILEEN REIKO NITASAKA** may all be beneficiaries of this estate based upon the Decedent's Will.

Age: 2	<b>TEMPORARY EXPIRES 09/11/2014</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	<b>ADRIANA BREWER</b> , non-relative, is Petitioner.	<b>Minute Order of 07/28/2014:</b> The petitioner is advised that she is responsible for providing notice to the parties specifically, the paternal grandparents, maternal grandmother, and the father.
	Father: <b>DERRICK KING</b> , Declaration of Due Diligence filed 08/20/2014	<b>Minute Order of 06/09/2014:</b> Father needs to be served.
Cont. from 040814, 060914, 072814	Mother: <b>EVONIESHA SMITH</b>	<b>Minute Order of 04/08/2014:</b> Ms. Smith is directed to provide her contact information to the Clerk's office forthwith.
<input type="checkbox"/> Aff.Sub.Wit.	Paternal grandparents: NOT LISTED	<b>The following issues remain:</b>
<input checked="" type="checkbox"/> Verified	Maternal grandfather: NOT LISTED	1. Need proof of personal service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for:
<input type="checkbox"/> Inventory	Maternal grandmother: TRINA SMITH	<ul style="list-style-type: none"> <li>Derrick King (Father) – Unless the Court dispenses with Notice.</li> </ul>
<input type="checkbox"/> PTC	<b>Petitioner states</b> that she is Kylie's godmother and has been caring for Kylie on and off most of her life. Petitioner states that she is the only mother Kylie knows as her real mother has been in and out of her short life. Petitioner states that guardianship is needed in order for her to be able to seek medical treatment and financial assistance to meet Kylie's needs. Also, Kylie's mother has recently stated she wanted to take Kylie again. Petitioner wants to continue to provide a safe and stable home for Kylie.	Note: Declaration of Due Diligence filed 08/20/2014 states that the father is in prison and that his mother and the child's mother would not give him any information as to which prison he is in.
<input type="checkbox"/> Not.Cred.		<ul style="list-style-type: none"> <li>Evoniesha Smith (Mother)</li> </ul>
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.	x	
<input checked="" type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input checked="" type="checkbox"/> Objections	<b>Opposition of Biological Mother Evoniesha Smith to Petition for Guardianship by Adriana Brewer and/or Any Other Person Over Minor Kylie Lynee Smith, filed on 04/04/2014</b> states she never received notice from any person of the court hearing set on 04/08/2014 in this matter, or any other court proceedings. Ms. Smith states she never received notice that Adriana Brewer, or any other person, was attempting to obtain guardianship over her daughter. Ms. Smith states that she discovered that there was a guardianship hearing for permanent guardianship by calling around to the courthouse and making inquiries after her suspicions were aroused by Adriana Brewer's behavior and statements.	
<input type="checkbox"/> Video Receipt		
<input checked="" type="checkbox"/> CI Report		
<input checked="" type="checkbox"/> 9202		
<input type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input checked="" type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
	<b>Please see additional page</b>	
		<b>Reviewed by:</b> LV
		<b>Reviewed on:</b> 09/08/2014
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 16 – Smith</b>

**Continued from previous page:** Ms. Smith opposes any and all attempts of Adriana Brewer and/or any other person to have temporary guardianship, permanent guardianship or any form of custody over her daughter. Ms. Smith states that she has known Adriana Brewer for a few years. Several months ago Ms. Smith was having a difficult time financially and was in a transitional period. During this time period Adriana Brewer began helping care for the minor child. Once Ms. Smith got back on her feet she requested Adriana Brew to return the child to her however she refused and told her that the legal system was involved. This led Ms. Smith to make inquiries and discovering that there was a 04/08/2014 hearing regarding permanent guardianship over the child. To date Ms. Smith has not had the opportunity to read or review any documents in the court file because she resides in Los Angeles County. Ms. Smith respectfully requests that this Honorable Court deny the request for guardianship and order Adriana Brewer to immediately return custody of the minor to the mother. This will allow the child to be with her mother, the person who has her best interest, and her three siblings.

Additionally, if this Honorable Court is inclined to grant permanent guardianship of her daughter to Adriana Brewer, or any other person, Ms. Smith respectfully requests that this court continue the matter so that she may respond appropriately.

**Declaration filed by Evoniesha Smith, Mother, on 04/07/2014** states Ms. Brewer has been a good temporary provider for the minor child, looking at her Facebook page reflects the love and reflects the selfishness motives of wanting to take the child away from Ms. Smith, mother. Ms. Smith states she went through a moment of despair and needed support. She thanks her for that. Ever since January 27<sup>th</sup> Ms. Smith has wanted to gain natural custody of her child back so she can raise her child.

Declaration also includes several documents including Facebook page photos, Verification of Benefits for the child, Money Order for the care of the minor child to Adriana Brewer, Immunization Records for the child.

**Declaration filed by Evoniesha Smith, Mother, on 06/09/2014 states** the father is not on the birth certificate or doesn't want to take DNA.

**Declaration filed by Trinia Smith, Maternal Grandmother, on 09/04/2014** states that she is filing Evoniesha Smith's Section 8 Voucher for the Courts. Attached is a Housing Choice Voucher Program from the U.S. Department of Housing and Urban Development.

**DSS Social Worker Tracy Miller's report filed 04/07/2014.**

**Needs/ Problems / Comments continued:**

2. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for:
  - Paternal Grandfather(Not Listed)
  - Paternal Grandmother (Not Listed) – Unless the Court dispenses with notice.

**Note:** Declaration of Due Diligence filed on 08/20/2014 states Rena Grandmother lives somewhere in Las Vegas. The child's mother would not give her any information or her last name.

  - Maternal Grandfather (Not Listed)
  - Trina Smith (Maternal Grandmother)

**Note:** A Declaration of Due Diligence filed on 08/20/2014 which states "grandfather" however it does not indicate whether this is for the maternal or paternal grandfather. It states that the mother would not give her any information on the man that is supposed to be the child's grandfather.

3. Proof of Service on Trina Smith filed 09/08/2014 is incomplete and does not provide the date or place of mailing.

17 Thomas Cole Talbot (Det Succ) Case No. 14CEPR00433

Atty Lovejoy, Randy (Pro Per Petitioner)  
Atty Price, Jennifer Marie (Pro Per Petitioner)

Petition to Determine Succession to Real Property (Prob. C. 13151)

DOD: 5-23-12		RANDY LOVEJOY and JENNIFER MARIE PRICE, Friends, are Petitioners.	NEEDS/PROBLEMS/COMMENTS:
		40 days since DOD	<u>Note: Pursuant to the objection, this petition is moot and should be denied and dismissed as the property has already been administered by the Public Administrator.</u>
Cont'd from 062614		No other proceedings	
		I&A: \$70,000.00	<u>Therefore, this petition cannot go forward. The following Examiner Notes remain for reference only:</u>
Aff.Sub.Wit.		Will dated 3-10-10 devises decedent's entire estate to Petitioners.	
✓ Verified		Petitioners request Court determination that Decedent's real property located at 3992 E. Marcus in Friant, CA, passes to them, each as to an undivided one-half interest.	1. Need filing fee of \$435.00. This petition was filed with a fee waiver; however, because the asset valued at \$70,000.00 is requested to be distributed to Petitioners. Therefore, the filing fee is due prior to distribution.
✓ Inventory			
PTC		On 8-20-14, the Fresno County Public Administrator filed an Objection.	2. Petitioners do not state Decedent's interest in the property. Did the decedent own a 100% interest in the property?
Not.Cred.			
Notice of Hrg		Objector states the petition is moot because the estate consisting solely of real property was already administered by the Public Administrator pursuant to Probate Code §7660(a)(2). This case was first reported to the Public Administrator by the Coroner on 5-24-12, the day after the decedent died. The PA researched the estate and determined there was no personal property to be sold and the house had over \$100,000 in liens against it, including a bail bond and back taxes. The property was worth no more than \$50,000, so it could not be sold. It was expected to go to tax sale. Therefore, it appeared there was no estate to probate at that time.	3. <del>Decedent's will is not self-proving. The Court may require Proof of Subscribing Witness (DE-131) pursuant to Probate Code §8220.</del>
Aff.Mail			
Aff.Pub.		In May 2014, Wayne Fox, Supervising Environmental Health Specialist, contacted the PA and explained that the property had come to the attention of the Fresno County Board of Supervisors because it was a reported drug house next to a school. The PA visited the property with a Sheriff Deputy, who reported that they check on the house daily. He also advised that Randy Lovejoy reported that he was handling the estate.	4. Need order (DE-315).
Sp.Ntc.			
Pers.Serv.		On 5-1-14, the PA contacted Mr. Lovejoy, who stated that the property was his pursuant to a will he found on a guitar he took from the residence, but the debt was not his. The PA explained that the debt was on the residence and the PA was probating the estate due to the liens and condition of the property. Mr. Lovejoy then filed this petition on 5-13-14.	Reviewed by: skc
Conf. Screen			Reviewed on: 9-8-14
Letters		Also on 5-13-14, Mr. Fox provided information regarding the status of the house as a "local drug house and trash dump." The property has been extensively vandalized and is extremely dilapidated and most likely need to be torn down.	Updates:
Duties/Supp			Recommendation:
✓ Objections		SEE ADDITIONAL PAGES	File 17 - Talbot
Video Receipt			
CI Report			
9202			
Order	X		
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			

Page 2

Objection (Cont'd): Various appraisals and contractors recommended demolition. The bail bondsman agreed to file a deed of reconveyance, and released the lien of \$110,000.00. The Franchise Tax Board, which was owed \$86,000.00, agreed to take whatever could be paid.

The PA accepted an offer from Table Mountain Rancheria and the property was sold. After commissions and sale expenses, \$22,943.90 was paid toward the tax lien. The PA received \$2,025.00 for fees and additional taxes.

Therefore, there is no property to go to Mr. Lovejoy, so his petition is moot and should be dismissed.

**Petition for Appointment of Probate Conservator of the Person and Estate (Prob. C. 1820, 1821, 2680-2682)**

<b>Age: 28 years</b> <b>DOB: 7/23/1986</b>		<p align="center"><b>TEMPORARY EXPIRED 7/31/14</b></p> <p><b>SHEILA R. SCOTT</b>, mother, is petitioner and requests appointment as conservator of the person with medical consent powers and conservator of the estate without bond.</p> <p><b>Estimated value of the estate: \$0</b></p> <p><b>Declaration of Stephen Grossman, M.D., 5/22/14</b> supports the request for medical consent powers.</p> <p><b>Petitioner states</b> the proposed conservatee cannot breathe or eat on her own. She cannot talk or move her limbs. She cannot care for herself in any way. She cannot make financial decisions on her own behalf.</p> <p><b>Court Investigator Jennifer Young's Report filed on 6/25/14.</b></p> <p><b>Supplemental Report of Court Investigator Jennifer Young filed on 6/27/14.</b></p> <p><b>Probate Referee: Rick Smith</b> (if conservatorship of the estate is granted)</p> <p align="center"><b>Please see additional page</b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Court Investigator Advised Rights on 6/20/14.</b></p> <p><b>Continued from 7/31/14. Minute order states The court requests a declaration from Mr. Miligan as to the status of the [civil] case. If the matter is ready for trial, any proposed settlement information and address the limited proceeds for settlement. Petitioner is instructed to cure the defects in the examiner notes.</b></p> <p>1. If Conservatorship of the Estate is granted bond will be required pursuant to Probate Code §2320. Or in the alternative, the court could order the proceeds of the settlement into a blocked account.</p>	
<b>Cont. from 070114, 073114</b>				
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>			
<input checked="" type="checkbox"/>	<b>Verified</b>			
<input type="checkbox"/>	<b>Inventory</b>			
<input type="checkbox"/>	<b>PTC</b>			
<input type="checkbox"/>	<b>Not.Cred.</b>			
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>			
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>			W/
<input type="checkbox"/>	<b>Aff.Pub.</b>			
<input type="checkbox"/>	<b>Sp.Ntc.</b>			
<input type="checkbox"/>	<b>Pers.Serv.</b>			
<input checked="" type="checkbox"/>	<b>Conf. Screen</b>			
<input checked="" type="checkbox"/>	<b>Letters</b>			
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>			
<input type="checkbox"/>	<b>Objections</b>			
<input checked="" type="checkbox"/>	<b>Video Receipt</b>			
<input checked="" type="checkbox"/>	<b>CI Report</b>			
<input type="checkbox"/>	<b>9202</b>			
<input checked="" type="checkbox"/>	<b>Order</b>			
<input type="checkbox"/>	<b>Aff. Posting</b>			
<input type="checkbox"/>	<b>Status Rpt</b>			
<input type="checkbox"/>	<b>UCCJEA</b>			
<input checked="" type="checkbox"/>	<b>Citation</b>			
<input type="checkbox"/>	<b>FTB Notice</b>			
		<b>Reviewed by: KT</b>		
		<b>Reviewed on: 9/9/14</b>		
		<b>Updates:</b>		
		<b>Recommendation:</b>		
		<b>File 18 - Foster</b>		



**Declaration of David L. Milligan filed on 8/7/14 states** he is the attorney of record in the action for Plaintiff J.L. Scott, Odessor Scott and Quinana Lasalle Foster v. Jason Cabusas, Aurelio Babusas, Claudia Carraco Solis, Jose Jesus Maruez and Does 1 through 25, case no. 13CECG00019. Ms. Foster's case is pending resolution. Currently there is an offer of \$20,000. It is Mr. Milligan's recommendation that Ms. Foster accept this offer based on several factors. It is a reasonable offer based on Mr. Milligan's knowledge and expertise. Ms. Foster will net less than \$9,000. This is not final since the outcome cannot be determined until all the liens are reduced.

**Note:** If the conservatorship of the estate is granted, status hearings will be set as follows:

- **Wednesday, October 22, 2014** at 9:00 a.m. in Department 303, for the filing of the bond or receipt for blocked account.
- **Wednesday, February 11, 2015** at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal.
- **Wednesday, November 18, 2015** at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution.

Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.

Pro Per Calderon, Christina (Pro Per Petitioner, maternal grandmother)

## Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Diamonique Age: 10		<b>TEMPORARY EXPIRES 7/28/2014; extended to 9/11/2014</b>  <b>CHRISTINA CALDERON</b> , maternal grandmother, is Petitioner.  Father: <b>CHRISTOPHER CORY BOUCHER</b>  Mother: <b>CHRISTINA A. BOUCHER</b>  Paternal Grandfather: Joe Boucher Paternal Grandmother: Patricia Boucher  Maternal Grandfather: Joe Calderon  <b>Petitioner states</b> the children have been residing with her for about four years, the mother is homeless and on meth, and when she comes around she yells, curses and argues with the Petitioner in front of the children. Petitioner states the children do not want to live with their parents, the father lives in Nebraska in the Air Force, and he has to be deployable to stay in the Air Force.  <b>Court Investigator Jennifer Daniel's Report was filed on 7/21/2014.</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u><b>Continued from 7/28/2014:</b></u> Minute Order [Judge Smith] states the father is to be served before the next hearing.  <b>Note:</b> Minute Order dated 6/10/2014 from the hearing on the temporary petition states the Court directs that the father be personally served for the [7/28/2014] hearing. The Court Investigator is ordered to speak with the children.  <b>The following issues from the last hearing remain:</b> 1. Need Notice of Hearing.  2. Need proof of personal service of the Notice of Hearing with a copy of the <i>Petition for Appointment of Guardian</i> , or <i>Consent to Appointment of Guardian and Waiver of Notice</i> , or a <i>Declaration of Due Diligence</i> , for: <ul style="list-style-type: none"> <li>Christopher Cory Boucher, father;</li> <li>Christina A. Boucher, mother.</li> </ul> 3. Need proof of service by mail of the Notice of Hearing with a copy of the <i>Petition for Appointment of Guardian</i> , or <i>Consent to Appointment of Guardian and Waiver of Notice</i> , or a <i>Declaration of Due Diligence</i> , for: <ul style="list-style-type: none"> <li>Joe Boucher, paternal grandfather;</li> <li>Patricia Boucher, paternal grandmother;</li> <li>Joe Calderon, maternal grandfather.</li> </ul>
Victoria Age: 9			
Cont. from 072814			
Aff.Sub.Wit.			
✓ Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg	X		
Aff.Mail	X		
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.	X		
✓ Conf. Screen			
✓ Letters			
✓ Duties/Supp			
Objections			
Video Receipt			
✓ CI Report			
✓ Clearances			
✓ Order			
Aff. Posting			
Status Rpt			
✓ UCCJEA			
Citation			
FTB Notice			
Reviewed by: LEG			
Reviewed on: 9/9/14			
Updates:			
Recommendation:			
File 19 - Boucher			

			<b>MANILA VANG</b> , Sister, is Petitioner and requests appointment as Probate Conservator of the Person with medical consent powers.  Voting rights <u>not</u> affected  <i>A Capacity Declaration (GC-335) has not yet been filed to support the request for medical consent powers.</i>  <b>Petitioner states</b> her sister has had various medical issues since birth and at this time is also mentally ill.  <b>Court Investigator Dina Calvillo filed a report on 9-3-14.</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Court Investigator advised rights on 8-26-14.</b>  1. Need Capacity Declaration (Form GC-335) in support of request for medical consent powers.
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input checked="" type="checkbox"/>	Pers.Serv.			
<input checked="" type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input checked="" type="checkbox"/>	Video Receipt			
<input checked="" type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input checked="" type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
			Reviewed by: skc Reviewed on: 9-9-14 Updates: Recommendation: File 20 – Le Chang	

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

<b>DOD: 01/12/2011</b>		<b>LOGAN WILLIAM DURHAM</b> , is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		Full IAEA - ?	<b>The deficiencies with the pleadings include, but are not limited to, the following:</b>
		Will dated: 02/12/2011	
<b>Cont. from</b>			1. Petitioner is not listed on #8 of the petition as required and it is unclear what the relationship is to the decedent.
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	x	
<input checked="" type="checkbox"/>	<b>Verified</b>		2. Need original will to be deposited with the Court pursuant to Probate Code §8200(a)(1).
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		3. Copy of the decedent's Will is not attached as required.
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input type="checkbox"/>	<b>Notice of Hrg</b>	x	4. Petition states that the will is dated 02/12/2011 however the date of death of the decedent is 01/12/2011. Need clarification.
<input type="checkbox"/>	<b>Aff.Mail</b>	x	
<input type="checkbox"/>	<b>Aff.Pub.</b>	x	5. #2b(1), #2b(2), #2b(3), #b(4) was not answered regarding petitioner being appointed as Executor, Administrator, Administrator with Annexed or Special Administrator.
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		6. #2c was not answered regarding full or limited authority.
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b>	x	7. #2d(1), #2d(2) or #2d(3) of the petition regarding bond is incomplete.
<input type="checkbox"/>	<b>Duties/Supp</b>	x	
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input type="checkbox"/>	<b>Order</b>	x	
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		<b>Reviewed by:</b> LV
<input type="checkbox"/>	<b>UCCJEA</b>		<b>Reviewed on:</b> 09/09/2014
<input type="checkbox"/>	<b>Citation</b>		<b>Updates:</b>
<input type="checkbox"/>	<b>FTB Notice</b>		<b>Recommendation:</b>
			<b>File 21 - Durham</b>

**Needs / Problems / Comments continued:**

8. #3f regarding Appointment of Personal Representative is incomplete.
9. Page 3 of the petition was not completed therefore it is unclear as to who the heirs or beneficiaries are and who would be entitled to notice.
10. Need Affidavit of Publication.
11. Need Notice of Petition to Administer Estate.
12. Need Duties & Liabilities, Mandatory Judicial Council Form DE-147.
13. Need Confidential Supplement to Duties & Liabilities of Personal Representative, Mandatory Judicial Council Form DE-147S.
14. Need Order.
15. Need Letters.

Age: 10		<u>GENERAL HEARING 11/04/14</u>		<b>NEEDS/PROBLEMS/COMMENTS:</b>	
		<b>ANTONIA C. GARCIA</b> , maternal grandmother, is Petitioner.		1. Need proof of personal service at least 5 court days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Temporary Guardian of the Person</i> <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for: a. Guadalupe Garcia (mother)	
		Father: <b>TONY PENA, JR.</b> – <i>deceased</i>			
		Mother: <b>GUADALUPE GARCIA</b>			
Cont. from		Paternal grandfather: ANTONIO PENA – <i>deceased</i>			
	Aff.Sub.Wit.		Paternal grandmother: MARIA SEGURA		
✓	Verified		Maternal grandfather: ADAN GARCIA – <i>deceased</i>		
	Inventory				
	PTC				
	Not.Cred.				
✓	Notice of Hrg				
✓	Aff.Mail	w/	<b>Petitioner alleges</b> that the mother uses drugs and is under the influence most of the time. She is abusive and aggressive. Petitioner states that she fears for her safety as well as the minor's with the mother living in the home.	<b>Note:</b> Petitioner was previously appointed as guardian of this minor on 02/24/06. The guardianship was terminated on 05/02/13 upon the petition of the mother.	
	Aff.Pub.				
	Sp.Ntc.				
	Pers.Serv.				
✓	Conf. Screen				
✓	Letters				
✓	Duties/Supp				
	Objections				
	Video Receipt				
	CI Report				
	9202			<b>Reviewed by:</b> JF <b>Reviewed on:</b> 09/09/14 <b>Updates:</b> <b>Recommendation:</b> <b>File 22 - Pena</b>	
✓	Order				
	Aff. Posting				
	Status Rpt				
✓	UCCJEA				
	Citation				
	FTB Notice				

Atty Hawkins, Richard Jr. (pro per – non-relative/Petitioner)

Atty Hawkins, Jennifer L. (pro per – non-relative/Petitioner)

## Petition for Appointment of Temporary Guardian of the Person

Kylie-Rae, 15	<b>GENERAL HEARING 11/04/14</b>		<b>NEEDS/PROBLEMS/COMMENTS:</b>
Kayla-Raine, 14	<p><b>RICHARD HAWKINS, JR. and JENNIFER HAWKINS</b>, non-relatives, are Petitioners.</p> <p>Father: <b>CAESAR SHOSTAK</b> – Consent &amp; Waiver of Notice filed 08/27/14  Mother: <b>JENNIFER STARR</b> – deceased</p> <p>Paternal grandfather: UNKNOWN  Paternal grandmother: PIXIE SHOSTAK – Consent &amp; Waiver of Notice filed 08/27/14</p> <p>Maternal grandfather: TOM STARR – deceased  Maternal grandmother: LAURA STARR – Consent &amp; Waiver of Notice filed 08/27/14</p> <p><b>Petitioners allege</b> that they were good friends of the mother's and the girls use to visit their house regularly. Petitioners state that the girls currently have Medi-Cal insurance. Kylie has some urgent medical needs that need to be addressed, but Medi-Cal is taking a long time to approve necessary tests. Petitioner request temporary guardianship so that they can add the girls to their private insurance and get the needed medical care asap.</p>		
Cont. from			<p>Elizabeth Shields, maternal aunt, was appointed guardian on 10/18/13. Ms. Shields filed a Petition for Termination of Guardianship that is set for hearing on 11/04/14. Until the guardianship of Ms. Shields is terminated, there is no vacancy at guardian.</p> <ol style="list-style-type: none"> <li>1. Need Notice of Hearing.</li> <li>2. Need proof of personal service at least 5 court days before the hearing of Notice of Hearing with a copy of the Petition for Appointment of Temporary Guardian of the Person <u>or</u> Consent &amp; Waiver of Notice <u>or</u> Declaration of Due Diligence for: <ol style="list-style-type: none"> <li>a. Elizabeth Shields (guardian/maternal aunt)</li> </ol> </li> </ol>
Aff.Sub.Wit.			
✓ Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg	x		
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.	x		
✓ Conf. Screen			
✓ Letters			
✓ Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
✓ Order			
Aff. Posting			
Status Rpt			
✓ UCCJEA			
Citation			
FTB Notice			
			Reviewed by: JF
			Reviewed on: 09/09/14
			Updates:
			Recommendation:
			File 23 - Minors

**Petition to Establish Trust Interest Over Real and Personal Property**

<b>DOD: 6-5-13</b>		<b>FRANCISCO E. ALVAREZ</b> , Successor Trustee, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		Petitioner states Settlor Edith Corinne Nelson created the trust on 2-15-05. The Settlor died on 6-5-13.	<b>1. Petitioner provided a copy of the trust, but did not provide a copy of the Schedule A that lists the house. The Court may require a copy of Schedule A.</b>
<b>Cont. from 090214</b>		Petitioner states the trust is now terminable and distributable according to its terms.	<b>2. Notice of Hearing filed 8-19-14 indicates mailing on 8-19-14, which is only 23 days prior to the hearing. Probate Code §17203 requires 30 days' notice. Continuance for proper time for notice may be necessary.</b>
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>	Schedule A of the trust reflects intended conveyance and transfer by the Settlor to the trust of her interest in certain real property on Brooke Avenue in Fresno. The trust also references the property by address at Article Five, Section 5.3(c). However, due to health issues, the Settlor did not record a trust transfer deed before her death.	
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>	On the same date as the trust, the Settlor also executed a pour-over will that names the trust as the sole beneficiary of the estate.	
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>	Petitioner states he has caused Notification of the Death of the Settlor and the Irrevocability of the Trust to be served upon beneficiaries pursuant to §16061.7 and no person has brought action to contest the trust.	
<input checked="" type="checkbox"/>	<b>Aff.Mail</b> w/o		
<input type="checkbox"/>	<b>Aff.Pub.</b>	<b>Petitioner prays for an order confirming the validity of the trust and that the property be determined to constitute an asset of the trust, and subject to the management and control of Petitioner as trustee, and for such other and further orders as the Court considers proper.</b>	
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		

**Reviewed by:** skc

**Reviewed on:** 8-27-14

**Updates:**

**Recommendation:**

**File 24- Nelson**